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# PURCHASING USER MANUAL

## SETTING UP AGENCY RULES

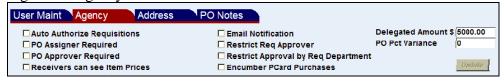
## INTRODUCTION

Several of the application's processes can be automated or enabled to suit your agency's business rules. You can set these up and then modify them as needed. Note that **PO** Assigner and PO Approver depend on other settings on the User Maint or Department screens.

# TO SET UP AGENCY RULES

- 1. Click the **Agency** tab.
- Check or uncheck the options as needed. See the examples below.
- When finished, click **Update**.

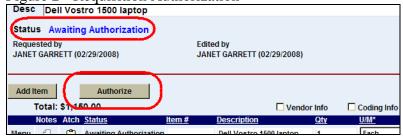
Figure 1 - Agency rules menu



### AUTO AUTHORIZE REQUISITIONS

Check this to automatically authorize requisitions before the fiscal coding is entered. Leave unchecked and requisitions will have to be authorized by a user designated as an **Authorizer** (see example below). NOTE: Even when unchecked, if an Authorizer creates a requisition and marks the 'Itemization Complete', the requisition will be 'automatically' authorized.

Figure 2 - Requisition Authorization



### PO ASSIGNER REQUIRED

Check this to require that purchase orders be assigned to specific purchasers (See example below). A user or users must be designated as an **Assigner** on the **User Maint** screen.

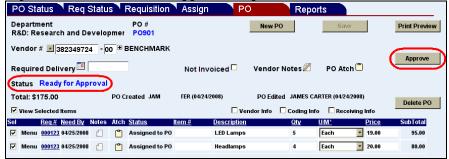
Figure 3 - Assign a requisition items to purchasers



### PO APPROVER REQUIRED

Check this to require that a purchase order be approved before the order can be placed with the vendor (see example below). A user or users must be designated as a **PO** Approver on the User Maint screen.

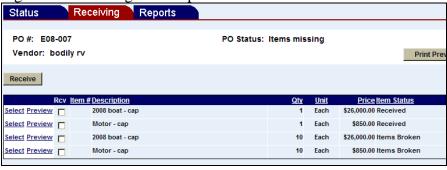
Figure 4 - Purchase Order approval required



#### RECEIVER CAN SEE ITEM PRICES

Check this to allow receiving personnel to see purchase order items prices on the **Receiving** screen of the application (see example below).

Figure 5 - Receiving can see prices



#### **EMAIL NOTIFICATION**

Check this for e-mail notifications to be sent when a requisition is unapproved or rejected by a requisition Approver or a Purchaser, or when purchase order items are received. The e-mails will be routed automatically to the person who made the Requisition. E-mails will be sent from SASAdmin@sco.idaho.gov.

### RESTRICT REQ APPROVER

Check this to restrict a user from approving their requisition (See example below).

Figure 6 - Restricted approver



#### RESTRICT APPROVAL BY REQ DEPARTMENT

Check this so that requisition approvers can approve only those requisitions assigned to their department(s). (See example above.)

#### **ENCUMBER PCARD PURCHASES**

Check this so that P-Card purchases will be sent to STARS even if the purchaser checks the **Not Invoiced** check box on the **PO** screen.

#### DELEGATED AMOUNT

The delegated purchasing authority granted to your agency by the Division of Purchasing. Requisitions and purchase orders that exceed this amount can still be entered in the application, but you must contact the Division of Purchasing regarding such purchases.

#### PO PCT VARIANCE

The **PO Pct Variance** is a whole number which represents a percentage, e.g., "10" = "10%". Any purchase order line item amount may not vary from the requisition line item amount by greater than this percentage. Enter a zero if you do not use the **PO Pct Variance**.

For example, if the requisition line item is \$100 and the **PO Pct Variance** is 10%, then the purchase order line item amount cannot be greater than \$110 or less than \$90. (This does not include freight charges. If there are freight charges, they also may not vary more than the **PO Pct Variance**.)

If a purchaser changes the line item so that the amount exceeds the **PO Pct Variance**, a message will be displayed explaining the restriction.

Figure 7 - PO Pct Variance warning

